



<b>Policy #:</b>	39.04.519
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<b>Revised:</b>	August 14, 2014
<b>Section:</b>	39 Research

## **Travel Policy for Research**

### **Purpose:**

To provide assistance to anyone who incurs travel expenses that will be charged to a BMC sponsored project by providing clear and consistent guidelines and policies for business travel charged to sponsored projects. To ensure proper documentation is obtained in accordance with internal and external guidelines, regulations (IRS, granting agencies, etc.). To set standards for employees to make provisions for transportation, accommodations and related expenditures efficiently and in a reasonable and cost-effective manner.

### **Policy Statement:**

Boston Medical Center (BMC) will reimburse the appropriate individual for all travel expenses on sponsored projects where appropriate. For all travel on sponsored projects, the Principal Investigator (PI) and Research Finance must approve the expense reimbursement. Travelers may be reimbursed one of two ways: either via per diem request *or* via reimbursement for actual receipts submitted. A traveler may not use both per diem request and actual reimbursements.

### **Application:**

This policy applies to anyone who incurs travel expenses that will be charged to a BMC sponsored project.

### **Exceptions:**

If expenses are to be charged to any hospital or donor restricted 065xxxx account.

### **Procedure:**

Meeting Registration Reimbursement:

A. Meeting registration can be reimbursed for the actual cost after meeting has taken place. The following three items must be submitted to Research Finance for approval:

- a. Copy of meeting flyer
- b. E-Requisition
- c. Proof of Payment

B. If traveler wants to be reimbursed prior to the meeting taking place, traveler may get reimbursed from a discretionary or departmental account. After the meeting takes place, please provide the documentation listed in Section A (a-c) above, along with a cost transfer form. Research Finance will prepare the journal entry to charge the federal account and credit the discretionary or departmental account.

C. If traveler does not attend the meeting, traveler must reimburse the sponsored project account.

#### Per Diem Request:

D. Per Diems must be requested prior to travel, no more than three weeks prior. Per Diems will cover cost of hotel, meals and incidental costs. The following three items must be submitted to Associate Director, Research Finance for approval:

- a. Per Diem Request Form
- b. E-Requisition ~ Invoice # must say **PER DIEM**
- c. Copy of meeting flyer if applicable

E. Upon return from the trip, traveler must complete and send in the "Travel Per Diem Return Form" to Associate Director, Research Finance within 10 business days. If this form is not received within 10 business days upon return of trip, the per diem expense will be considered "unallowable" and will be removed from the grant and charged to the traveler's department cost center.

F. If traveler does not attend the meeting traveler must reimburse the sponsored project account.

#### Reimbursement via actual receipts submitted:

G. Reimbursement will be made for the actual cost upon return of the trip. Requests must be sent to Research Finance for approval and should include the following documentation:

- a. E-Requisition
- b. Original and itemized receipts (including restaurant and hotel bill) regardless of amount
  - i. Required for all amounts > \$25.00
  - ii. While best efforts should be made to obtain original itemized receipts, exceptions may be made for items under \$25, mileage, tolls, reasonable tips, local bus or subway fares. Meals under \$25.00 with a certification by traveler that no alcohol was purchased will be reviewed and approved by Research Finance on a case by case basis.
  - iii. Special considerations may be granted for instances where itemized receipts are not available.
- c. Copy of meeting flyer
- d. Print out of Currency Exchange Rate if applicable
- e. If one person pays for a group, indicate on receipt names of additional attendees. Only one person may get reimbursed for total amount.

H. Travelers will **NOT** be reimbursed for the following miscellaneous expenses (including, but not necessarily limited to):

- a. Alcohol
- b. Payments made for contracted services or commodities covered under purchasing policies (Purchasing Department).
- c. Personal telephone calls (except those of short duration while traveling)
- d. Personal entertainment and all other items of a personal nature
- e. Expenses related to personal/vacation days while on a business trip
- f. Laundry and dry cleaning during business travel of less than 7 days
- g. Fines and penalties
- h. Parking tickets, traffic tickets, or any other motor vehicle violations
- i. Any item appearing unreasonable in nature or amount
- j. Annual fees for credit cards
- k. Corporate credit card delinquency fees and finance charges
- l. Rental of cellular phones
- m. Auto/Air/Rail Club memberships

#### Personal Car Use Reimbursement

- I. The use of a privately owned vehicle for sponsored project travel purposes is authorized when it is cost effective. Employees will be reimbursed at the current Internal Revenue

Service rate per mile, plus properly documented parking fees and tolls. The IRS per-mile rate covers the total cost of operating an automobile for local travel or transportation away from home, including such items as gasoline, oil, maintenance, repairs, etc. The total expense reported for transportation using a personal vehicle may not exceed the equivalent allowable economy airfare. The website for the federal service rate per mile can be found at: <http://www.gsa.gov/portal/content/100715>

- a. Mileage reimbursements under \$35.00 should be processed on a petty cash form [http://internal.bmc.org/grants/Forms/Post-Award%20Forms/pettyCashFormBMC\\_updated.pdf](http://internal.bmc.org/grants/Forms/Post-Award%20Forms/pettyCashFormBMC_updated.pdf)
- b. Mileage reimbursements over \$35.00 should be processed on an E-Requisition.

#### Airfare

J. Airfare is reimbursed for economy travel only.

K. For those flying using federal funds, grantees must comply with the Fly America Act requirement that U.S. flag air carriers be used by domestic grantees to the maximum extent possible when commercial air transportation is the means of travel between the United States and a foreign country or between foreign countries. This requirement must not be influenced by factors of cost, convenience, or personal travel preference. The cost of travel under a ticket issued by a U.S. flag air carrier that leases space on a foreign air carrier under a code-sharing agreement is allowable if the purchase is in accordance with GSA regulations on U.S. flag air carriers and code shares. (A code-sharing agreement is an arrangement between a U.S. flag carrier and a foreign air carrier in which the U.S. flag carrier provides passenger service on the foreign air carrier's regularly scheduled commercial flights.)

One exception to the Fly America requirement is transportation provided under a bilateral or multilateral air transport agreement, to which the United States Government and the government of a foreign country are parties, and which the Department of Transportation has determined meets the requirements of the Fly America Act.

The United States Government has entered into several air transport agreements that allow federal funded transportation services for travel and cargo movements to use foreign air carriers under certain circumstances.

There are currently four bilateral/multilateral "Open Skies Agreements" (U.S. Government Procured Transportation) in effect:

- United States (US) Government and the European Union (EU) effective April 30, 2007 US-EU Amendment effective June 24, 2010, and US-EU Amendment effective June 21, 2011
- United States (US) and Australia effective October 1, 2008
- United States (US) and Switzerland effective October 1, 2008
- United States (US) and Japan effective October 1, 2011

Information on the four Open Skies Air Transportation Agreements (U.S. Government Procured Transportation) and other specific country agreements may be accessed via the Department of State's website. <http://www.gsa.gov/portal/content/103191>

Certain limited exceptions to the general rule requiring use of U.S. carriers can be found in § 301-10.136, -10.137, and -10.138 of the Federal Travel Regulation (FTR). Note that applying for an exception will require the submission of additional documentation, explained in further detail in the FTR, available at: <http://www.ecfr.gov/cgi-bin/text-idx?SID=163209d8040dd5ca61091ab64814431c&node=41:4.2.2.4.3.2.13&rgn=div7>

L. When using **sponsored funds**, airfare will be reimbursed for the actual cost upon return from the trip. The following travel documentation must be submitted to Research Finance for approval:

- a. Copy of meeting flyer
- b. E-Requisition
- c. Proof of Payment
- d. Boarding Pass if no other expenses from destination are included in Reimbursement
- e. Reimbursement for first bag with receipt

M. Individuals requesting reimbursement for air travel prior to the return of the trip, may get reimbursed from a discretionary or departmental account. Upon return of the trip, the documentation listed in Section L (a-d) above, along with a cost transfer form must be submitted to Research Finance. Research Finance will prepare the journal entry to charge the federal account and credit the discretionary or departmental account.

N. **Not allowable:** Excess baggage charges, flight changes, air travel class upgrade, premium seating, travel protection plan, or replacement cost of lost baggage and its contents.

O. **Ground Transportation** (taxi cabs, etc.) will be reimbursed with original receipts.

### **Responsibility:**

Submission:

Principal Investigator  
Department Administrator

Approval Process:

Research Finance will review and approve accurate E-Requisition, and will forward to AP for payment.

Accounts Payable will cut a check with the first available check run following the receipt of the accurate paperwork.

### **Forms:**

[Per Diem Request Form](#)

[Upon Return of Travel Form](#)

### **Other Related Policies:**

39.04.007 Allowable Costs  
8.0 Fiscal/Materials Management, 08.11.000, BMC Travel Policy  
3.0 Clinical Care/Patient Rights 08.05.000

**References: Guiding Regulations:** 45 CFR Part 74 Appendix E, entitled "Principles for Determining Cost Applicable to Research and Development under Grants and Contracts with Hospitals 41 CFR §301– 10.135, §301–10.136, or §301–10.137 Federal Travel Regulation (FTR); Fly America Act; United States and European Union "Open Skies" Air Transport Agreement (US-EU Open Skies Agreement)

**Section: 39 Research**

**Policy No.: 39.04.519**

**Title:** Travel Policy for Research

**Initiated by:** Research Finance

**Contributing Departments:**

Accounts Payable